Federated Clover
INVESTMENT ADVISORS

Federated Clover Web Site Access Client User Manual

February 2014

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INVESTMENT ADVISORS

Important Facts

- Never hit the "Back" button on your browser — for security purposes your session will be terminated.
- At this time your assigned password cannot be changed.
- Your assigned password is not case sensitive.
- After 5 unsuccessful attempts to login, your account will be locked. An email can be generated to unlock your account. Please contact your client Service Administrator to unlock your account.

How Do I Access My Account Information On-Line?

#1: Open your web browser and go to www.federatedclover.com

#2: Click on “Login”

#3: Enter your User Id and Password & Hit Submit (assigned by Federated Clover)

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Some opportunities only we can see.
home
our firm
our people
portfolios
commentary
secure email
contact us
login
search us
go
Login
User Name:
Password:
submit
Attention:
We recently upgraded our portfolio operating system, which we do periodically to make sure we are current with the industry standards. Of course, it is Federated Clover's long held practice to exceed industry standards with regard to maintaining confidentiality for client information. As you would expect, we have set tight controls on the on-line access to account information. Most clients have not experienced any issues accessing their account information, but a few clients have reported some limitations with their on -line access, typically due to the browser used. If you experience any difficulties, please do not hesitate to contact us and we will work through the issues with you and make sure you get the information needed as soon as possible. We apologize for any inconvenience this may cause.
Forgot your Password? Please email here
Website User Manual
Federated Clover Investment Advisors, a division of Federated Global Investment Management Corp.
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Legal Disclaimer
Privacy Policy
Security Policy
Site Map

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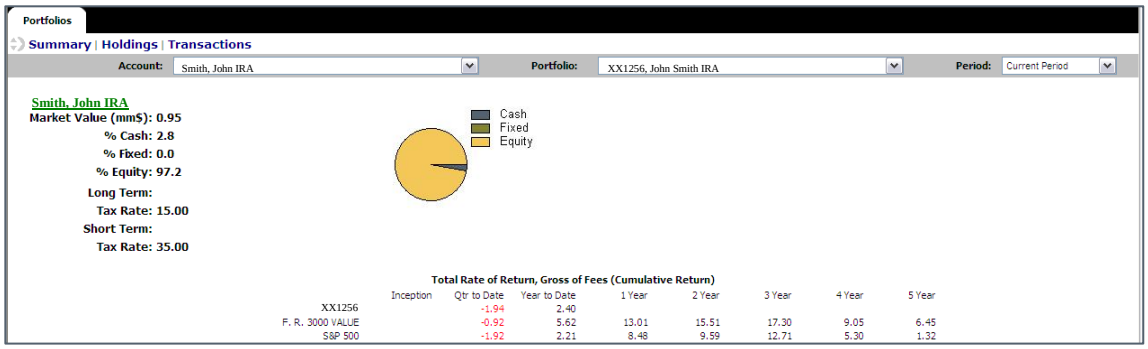
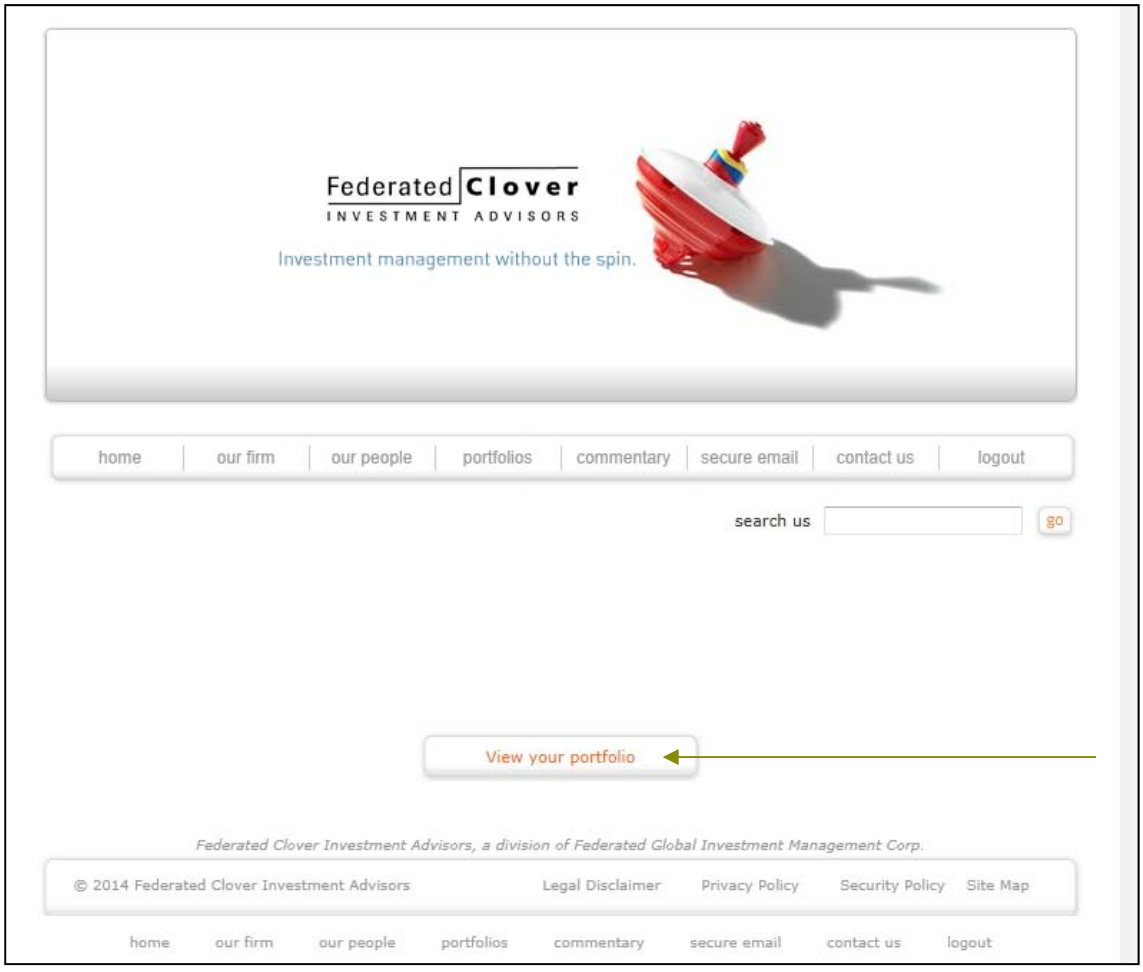
#4: A new window will open to your account summary page. If a new window does not open, then click on "View Your Portfolio." Pop-ups must be enabled for this site.


Portfolios
Summary | Holdings | Transactions
Account: Smith, John IRA
Portfolio: XX1256, John Smith IRA
Period: Current Period
Smith, John IRA
Market Value (mm$): 0.95
% Cash: 2.8
% Fixed: 0.0
% Equity: 97.2
Long Term:
Tax Rate: 15.00
Short Term:
Tax Rate: 35.00
Cash
Fixed
Equity
Total Rate of Return, Gross of Fees (Cumulative Return)
Inception Qtr to Date Year to Date 1 Year 2 Year 3 Year 4 Year 5 Year
XX1256 -1.94 2.40
F. R. 3000 VALUE -0.92 5.62 13.01 15.51 17.30 9.05 6.45
S&P 500 -1.92 2.21 8.48 9.59 12.71 5.30 1.32



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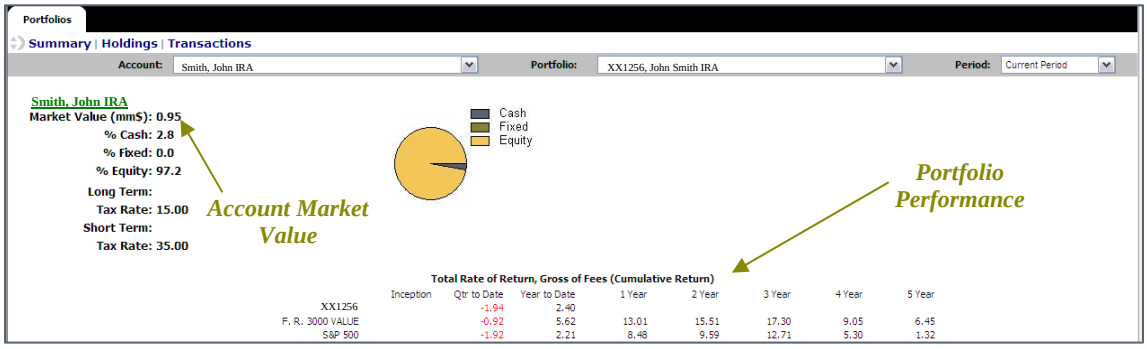
#5: Your Account Summary Page Will Appear (Market Value, Performance, etc.)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Account Market Value
Cash
Fixed
Equity
Portfolio Performance
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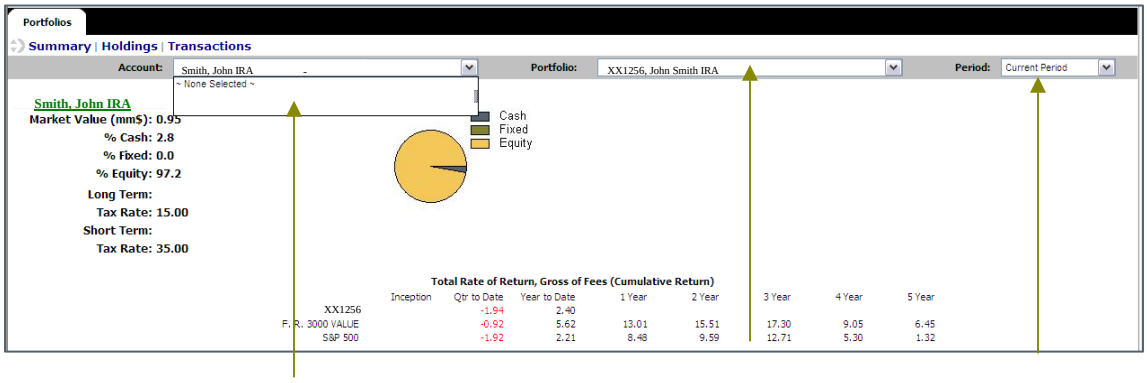
To View Other Accounts (if applicable) or to Switch Time Periods Use the Drop Down Menus


Portfolios
Summary | Holdings | Transactions
Account: Smith, John IRA
~ None Selected ~
Portfolio: XX1256, John Smith IRA
Period: Current Period
Smith, John IRA
Market Value (mm$): 0.95
% Cash: 2.8
% Fixed: 0.0
% Equity: 97.2
Long Term:
Tax Rate: 15.00
Short Term:
Tax Rate: 35.00
Cash
Fixed
Equity
Total Rate of Return, Gross of Fees (Cumulative Return)
Inception Qtr to Date Year to Date 1 Year 2 Year 3 Year 4 Year 5 Year
XX1256 -1.94 2.40
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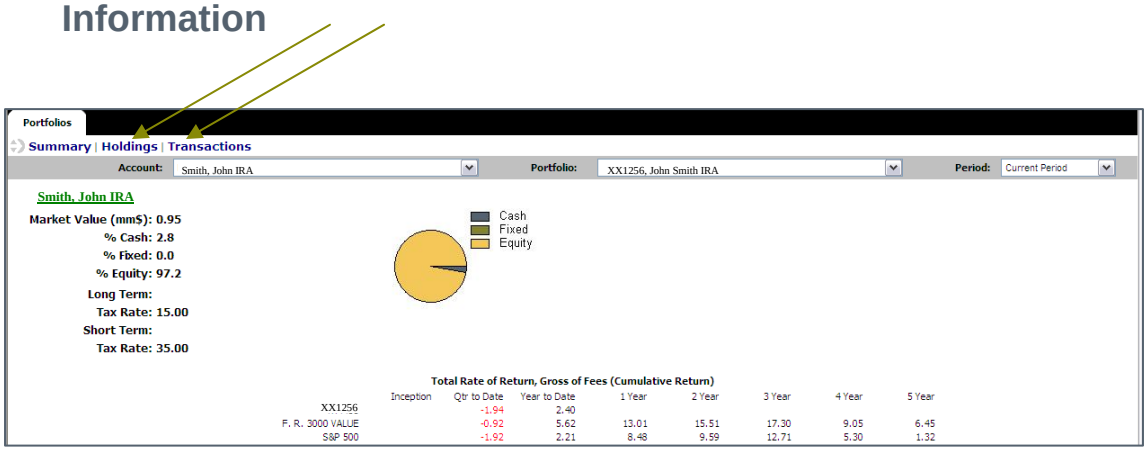
S&P 500 -1.92 2.21 8.48 9.59 12.71 5.30 1.32

Click on Holdings and Transactions to View Other Account Information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Portfolio: XX1256, John Smith IRA
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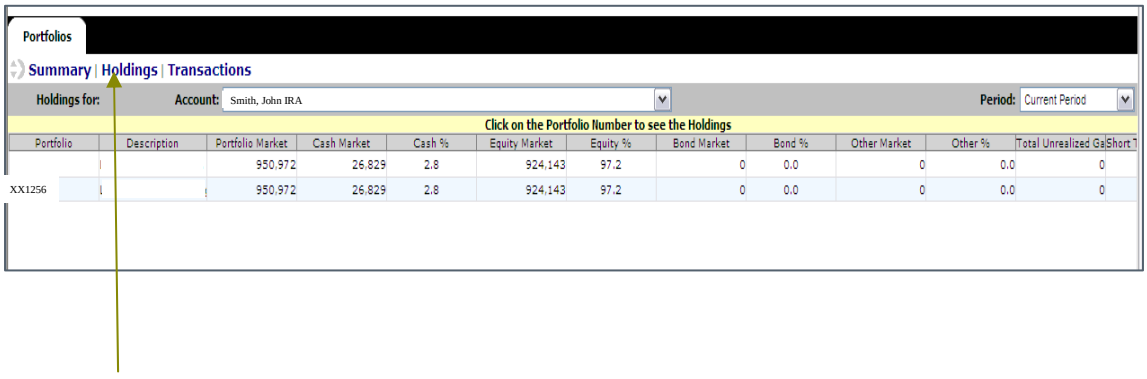
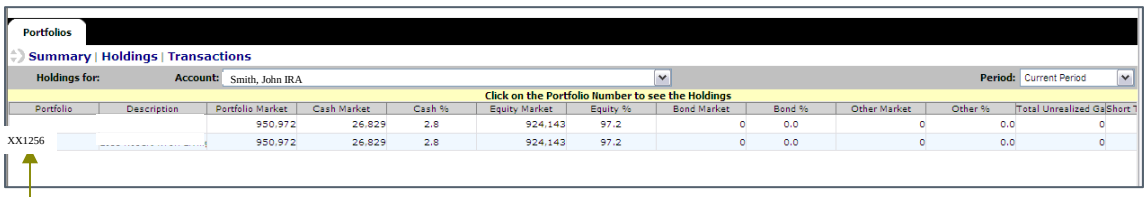
S&P 500 -1.92 2.21 8.48 9.59 12.71 5.30 1.32

Other Screens — Holdings & Transactions

HOLDINGS

The Holdings screen allows you to view the securities currently held in your portfolio(s). You may select different time periods from the drop down menu.





Click on the portfolio to view the holdings

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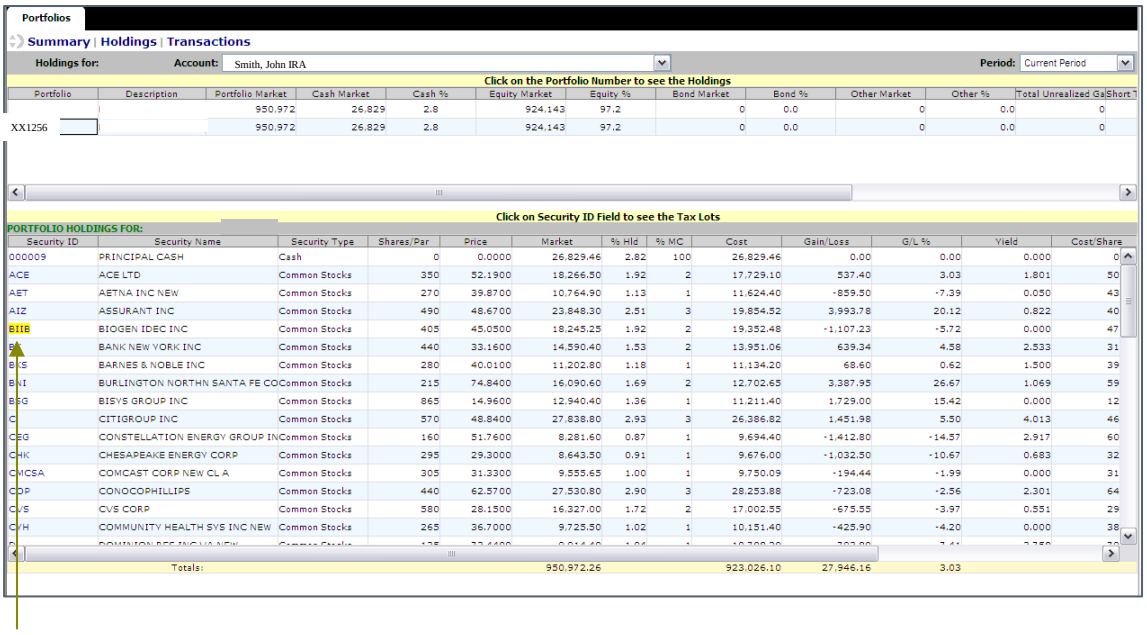
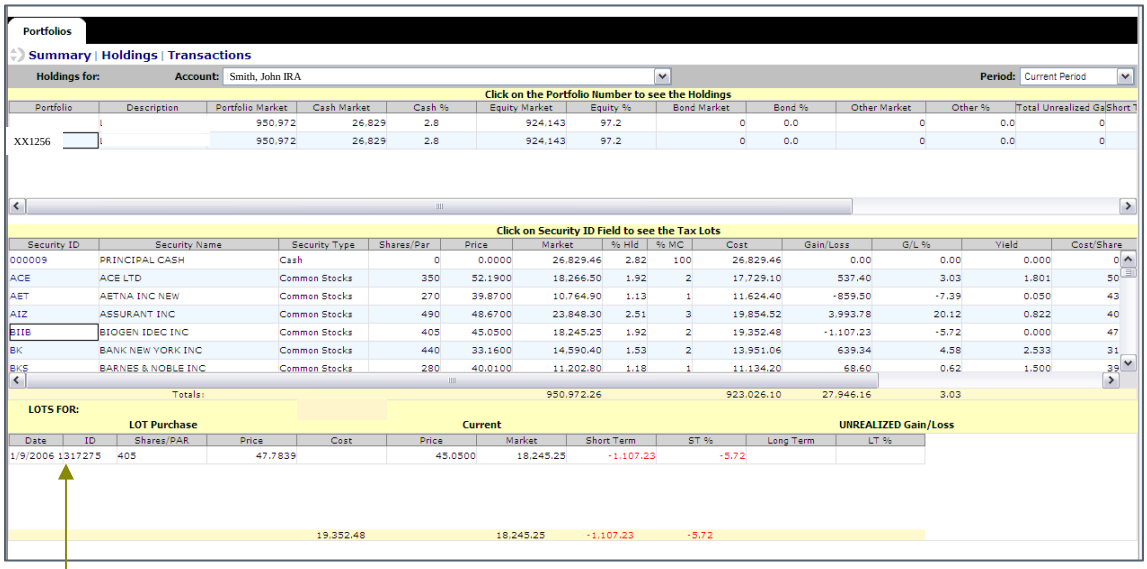

Portfolios
Summary | Holdings | Transactions
Holdings for:
Account: Smith, John IRA
Period: Current Period
Click on the Portfolio Number to see the Holdings
Portfolio
Description
Portfolio Market
Cash Market
Cash %
Equity Market
Equity %
Bond Market
Bond %
Other Market
Other %
Total Unrealized Ga
Short T
950,972
26,829
2.8
924,143
97.2
0
0.0
0
0.0
0
XX1256
950,972
26,829
2.8
924,143
97.2
0
0.0
0
0.0
0
Click on Security ID Field to see the Tax Lots
PORTFOLIO HOLDINGS FOR:
Security ID
Security Name
Security Type
Shares/Par
Price
Market
% Hld
% MC
Cost
Gain/Loss
G/L %
Yield
Cost/Share
000009 PRINCIPAL CASH Cash 0 0.0000 26,829.46 2.82 100 26,829.46 0.00 0.00 0.000 0
ACE ACE LTD Common Stocks 350 52.1900 18,266.50 1.92 2 17,729.10 537.40 3.03 1.801 50
AET AETNA INC NEW Common Stocks 270 39.8700 10,764.90 1.13 1 11,624.40 -859.50 -7.39 0.050 43
AIZ ASSURANT INC Common Stocks 490 48.6700 23,848.30 2.51 3 19,854.52 3,993.78 20.12 0.822 40
BIIB BIOGEN IDEC INC Common Stocks 405 45.0500 18,245.25 1.92 2 19,352.48 -1,107.23 -5.72 0.000 47
BK BANK NEW YORK INC Common Stocks 440 33.1600 14,590.40 1.53 2 13,951.06 639.34 4.58 2.533 31
BKS BARNES & NOBLE INC Common Stocks 280 40.0100 11,202.80 1.18 1 11,134.20 68.60 0.62 1.500 39
BNI BURLINGTON NORTHN SANTA FE CO Common Stocks 215 74.8400 16,090.60 1.69 2 12,702.65 3,387.95 26.67 1.069 59
BSG BISYS GROUP INC Common Stocks 865 14.9600 12,940.40 1.36 1 11,211.40 1,729.00 15.42 0.000 12
C CITIGROUP INC Common Stocks 570 48.8400 27,838.80 2.93 3 26,386.82 1,451.98 5.50 4.013 46
CEG CONSTELLATION ENERGY GROUP IN Common Stocks 160 51.7600 8,281.60 0.87 1 9,694.40 -1,412.80 -14.57 2.917 60
CHK CHESAPEAKE ENERGY CORP Common Stocks 295 29.3000 8,643.50 0.91 1 9,676.00 -1,032.50 -10.67 0.683 32
CMCSA COMCAST CORP NEW CL A Common Stocks 305 31.3300 9,555.65 1.00 1 9,750.09 -194.44 -1.99 0.000 31
COP CONOCOPHILLIPS Common Stocks 440 62.5700 27,530.80 2.90 3 28,253.88 -723.08 -2.56 2.301 64
CVS CVS CORP Common Stocks 580 28.1500 16,327.00 1.72 2 17,002.55 -675.55 -3.97 0.551 29
CYH COMMUNITY HEALTH SYS INC NEW Common Stocks 265 36.7000 9,725.50 1.02 1 10,151.40 -425.90 -4.20 0.000 38
Totals: 950,972.26 923,026.10 27,946.16 3.03

To view individual security information, click on the “Security ID”

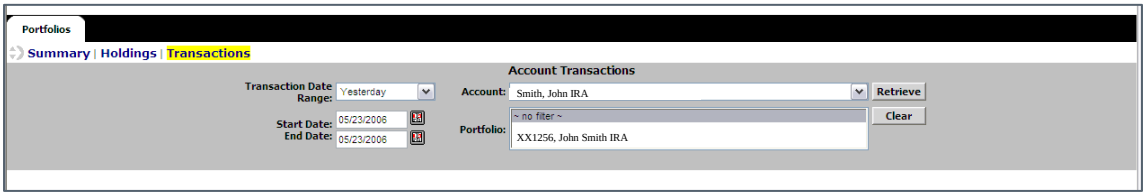


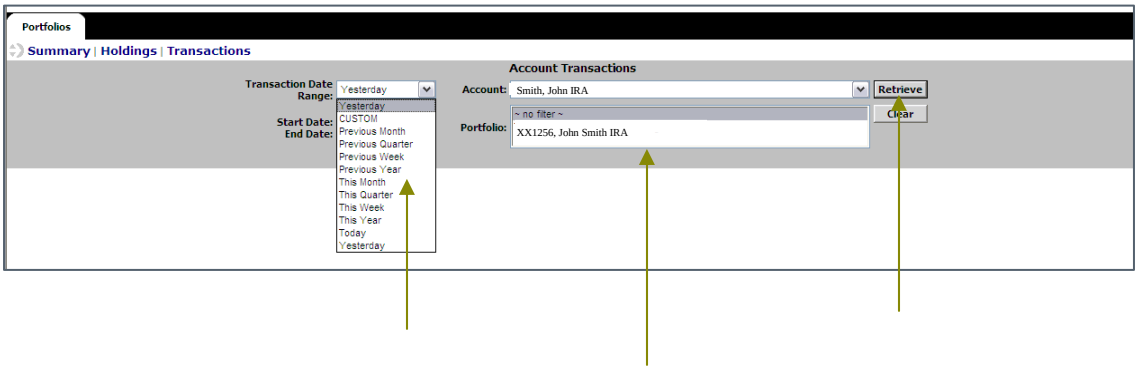
The “Tax Lot” information for the security will be displayed. This information may be helpful for your accountant at tax time.

Other Screens — Holdings & Transactions

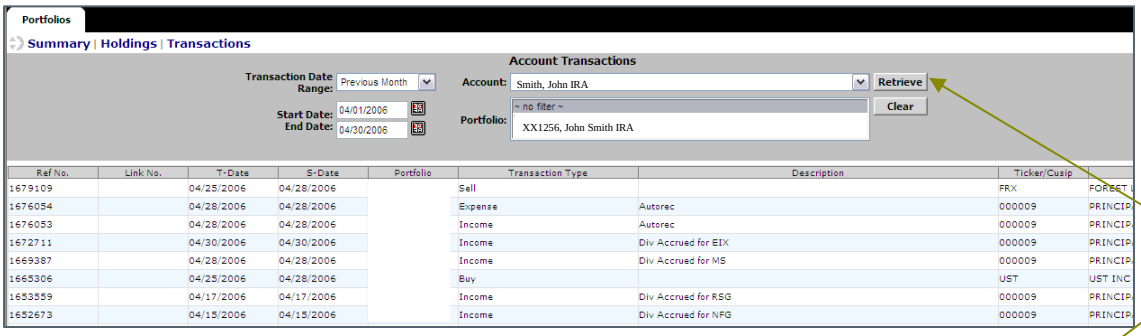
TRANSACTIONS

The Transactions screen allows you to view the securities purchased or sold in your portfolio(s) for a specific time period. The default time period will always be yesterday.

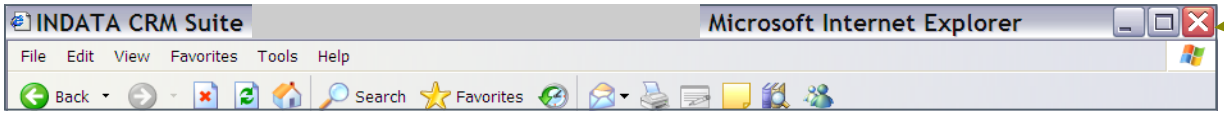




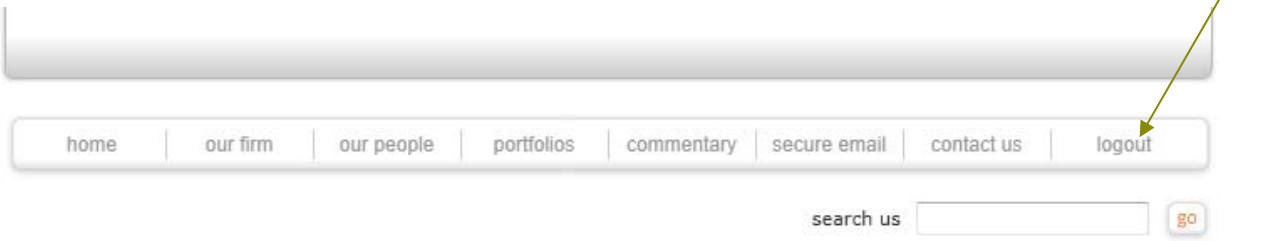
Select the time period and your account/portfolio and click on “Retrieve”


Portfolios
Summary | Holdings | Transactions
Account Transactions
Transaction Date Range: Previous Month
Start Date: 04/01/2006
End Date: 04/30/2006
Account: Smith, John IRA
Retrieve
Portfolio: ~ no filter ~
XX1256, John Smith IRA
Clear
Ref No. | Link No. | T-Date | S-Date | Portfolio | Transaction Type | Description | Ticker/Cusip
1679109 | 04/25/2006 | 04/28/2006 | Sell | FRX
1676054 | 04/28/2006 | 04/28/2006 | Expense | Autorec | 000009
1676053 | 04/28/2006 | 04/28/2006 | Income | Autorec | 000009
1672711 | 04/30/2006 | 04/30/2006 | Income | Div Accrued for EIX | 000009
1669387 | 04/28/2006 | 04/28/2006 | Income | Div Accrued for MS | 000009
1665306 | 04/25/2006 | 04/28/2006 | Buy | UST | UST INC
1653559 | 04/17/2006 | 04/17/2006 | Income | Div Accrued for RSG | 000009
1652673 | 04/15/2006 | 04/15/2006 | Income | Div Accrued for NFG | 000009

Once you hit “Retrieve” a list of all your transactions will be displayed.



To close out of your portfolio information, hit the “X” on your web browser and then log out of the Federated Clover web site.



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For questions and/or comments, please contact Your Client Service Administrator or email us as at webuser@federatedclover.com